

Executive Summary of Online Survey Results

Introduction and Purpose

The 2003-2007 Strategic Plan for Tourism and Recreation in Montana is the result of a collaborative planning process led by the Montana Department of Commerce Promotion Division. In draft form, the strategic elements for the Plan included seven major goals, and 42 objectives with proposed actions for each objective. In order to gather insights for prioritization of the goals and objectives, the planning team's outreach efforts were extended to include an online survey. Private citizens, business owners, state and federal agency employees, tribal members, non-profit organization members, municipal and community representatives actively participated in the informal survey, prioritizing the goals and objectives proposed in the draft Plan (see Survey Methodology details, page 6).

Summary of Key Findings

Survey results revealed consensus on some issues among respondents from private, public and non-profit sectors, and from the six tourism regions of Montana, and differences on other issues. Overall, respondents indicated support for the planning team's proposed draft strategic goals and objectives (none of the proposed objectives rated less than 3.34 mean score out of 5.00). However, survey results and respondent comments indicated a need to clarify wording/meaning in the final Plan. Overall results indicated that key priorities are the following:

- Serve Montanans first: preserve recreation opportunities, natural resources, affordability
- Maintain the lodging tax for tourism promotion and development
- Address access issues on public and private lands
- Improve Montana's transportation system for visitors
- Retain community character and sense of place
- Expand heritage and cultural tourism
- Protect Montana's natural/historic/cultural assets: focus on quality, monitor impacts
- Enhance traveler services (Visitor Info Centers - VIC's, rest areas, signs, etc.)
- Enhance awareness about tourism/recreation benefits and impacts among residents
- Address need for four-season tourism activities/events/attractions
- Build better collaboration between sectors, organizations, communities, regions
- Continue State's lead role in tourism promotion; track results of efforts

The online survey was conducted by The Hingston Roach Group, Inc., in association with Kara Harder & Associates and Bosma Associates International (www.web-surveys.net).

Appendix E: Online Survey Results Report

Survey Purpose

The survey was intended to provide further guidance and insights to the planning team. It is one of many methods used to gather input for the strategic plan. The findings will be used to refine strategic elements for the final Plan document.

Survey Participants

- ♦ 90 tourism and recreation stakeholder groups contacted (private, public, and non-profit sectors); 75 groups responded
- ♦ 422 potential survey participants contacted
- ♦ 248 respondents completed the survey - 59% response rate
- ♦ Respondents represented about one-third private sector, 42% public sector, about one quarter non-profit sector
- ♦ All six tourism regions represented
- ♦ Two-thirds of respondents have lived in Montana 20+ years

"They are all important, so in some ways it was difficult to rank them. My end result was to rank those issues that I thought needed to be considered or completed first, before going on to the next goal."

-Survey Respondent

"Product' is the key element. Without effective management of natural resources, the rest is irrelevant."

-Survey Respondent

Ranking of Goals

The first strategic question in the survey asked the respondents to rank the seven draft goals in order of priority. This proved to be challenging for some respondents for three key reasons: 1) If the respondent had not reviewed the draft strategic elements document (as recommended by the planning team) prior to participating in the survey, the goals were somewhat vague outside the context of more detailed information; 2) Due to differing interpretations of key words ("develop," "enhance," "support"), some respondents had concerns about the intent of the goals; and 3) Some respondents thought all seven goals were equally important or interconnected, so they ranked them sequentially.

After ranking the seven goals, respondents were asked to rate the objectives, within the context of the goals. The rating of objectives proved to be easier, since each objective included sample actions that are proposed to achieve the objective. As a result, the goals that ranked lowest early in the survey actually had the highest rated objectives, and the highest ranked goals had lower rated objectives (see Tables A.1, below, and A.4, page 4). Table A.2 at left shows the goal rankings by sector.

Table A.1: Ranking of Tourism & Recreation Goals

Rank	Goal #	Mean
1	Goal 3: Nurture business growth and diversification in the tourism and recreation industry.	4.71
2	Goal 2: Expand four-season visitor spending to distribute benefits of tourism to all regions of the state.	4.68
3	Goal 7: Build an effective tourism and recreation "team."	4.19
4	Goal 6: Communicate with the market through strategic promotion, measure results.	3.88
5	Goal 1: Enhance awareness and support for tourism and recreation.	3.57
6	Goal 5: Enhance and maintain tourism and recreation infrastructure.	3.40
7	Goal 4: Develop a system to manage/enhance/protect Montana's natural, historic and cultural assets.	3.18

Table A.2: Ranking of Goals by Sector (#'s are mean scores)

Goal #	Private	Public	Nonprofit
1	3.10	4.00	3.50
2	4.40	4.80	5.00
3	4.30	4.90	4.90
4	4.50	2.60	2.30
5	3.90	3.10	3.30
6	3.00	4.20	4.50
7	4.40	4.10	4.00

The private sector ranked Goal 4 (manage/enhance/protect Montana's natural/historic/cultural assets) as the most important goal, and ranked Goal 2 (expand statewide four-season spending) as second most important. The lowest ranked goals for the private sector were Goal 6 (promotion/research) and Goal 1 (enhance awareness/funding).

For the public and non-profit sectors, the highest ranked goals were Goal 2 (expand statewide four-season spending) and Goal 3 (enhance business growth). Surprisingly, the public and nonprofit sectors ranked Goal 4 (manage/enhance/protect assets) and Goal 5 (enhance infrastructure) as the lowest priorities. Based on respondent comments, this may have been due to feelings that "a system" already exists to manage/protect assets, and that "developing" or "enhancing" assets/infrastructure translates to degradation of natural or historical resources.

Table A.3 at right shows how respondents from Montana's six tourism regions ranked the goals. Goal 2 (expand statewide four-season spending) was highest priority for respondents from Glacier, Russell, Missouri River and Custer Countries. Gold West and Yellowstone Country respondents ranked Goal 3 (nurture business growth) as most important.

Surprisingly, the lowest ranked goal by respondents from Glacier, Gold West, Yellowstone, and Custer Countries was Goal 4 (manage/enhance/protect assets), while least important to Russell Country respondents was Goal 6 (communicate with the market), and least important to Missouri River Country respondents was Goal 5 (enhance infrastructure).

These results are not consistent with the ratings of the objectives by region, as detailed below. As stated earlier, a number of factors may have influenced respondents' rankings of the goals, and a clearer picture of actual priorities emerges when the results of the ratings of objectives are reviewed.

Ratings of Objectives

Table A.6 on page 5 summarizes the overall ratings of all forty-two objectives, according to their mean scores. Key findings of the ratings are the following:

- On a scale of 1 to 5, with 5 being highest, none of the forty-two objectives had an overall mean rating of less than 3.34.
- The top six rated objectives overall, in order of mean ratings, are the following:
 1. Maintain the Montana lodging tax for tourism promotion and development.
 2. Address access issues on public and private lands.
 3. Improve Montana's transportation system for resident/nonresident visitors.
 4. Retain community character and "sense of place" - be true to Montana heritage and community values.
 5. Expand products and services for heritage and cultural visitors.
 6. Support management tools to protect natural/historic/cultural assets while maintaining a viable tourism and recreation industry.
- The next six objectives related to providing enhanced visitor services (rest areas, signs), monitoring impacts of visitation, and awareness, planning and policy issues.
- The lowest rated objectives overall related to business development, regulation, business technical assistance and creative funding sources for tourism activities.

Table A.3: Ranking of Goals by Region

<u>Goal #</u>	<u>Glacier</u>	<u>Russell</u>	<u>Missouri River</u>	<u>Gold West</u>	<u>Yellowstone</u>	<u>Custer</u>
1	3.35	3.45	4.06	3.38	3.57	4.00
2	4.94	4.47	4.69	4.50	4.43	5.50
3	4.80	4.35	4.31	4.66	5.07	5.25
4	2.84	3.96	3.81	2.89	3.14	2.92
5	3.49	3.76	2.88	3.23	3.68	3.04
6	4.31	3.20	3.38	4.06	3.57	4.42
7	3.76	4.31	4.69	4.37	4.54	3.50

"The goals are heavily weighted in favor of development. The primary goal should be protection of the natural resources that provide the base for tourism and the rest of our economy, not direct promotion of the tourism industry."

-Survey Respondent

"Education is paramount. First, we need to educate Montana citizens and elected officials that other states are doing a better job of promoting their attractions than we are."

-Survey Respondent

"Communications is job one. It is vital to focus on the major mission. Individual small businesses cannot advertise effectively to large markets."

-Survey Respondent

"Tourism is the only growing industry in the state - we should not forget how this phenomenon has occurred as we proceed in the next five years. The success is due to the unique public/private partnership we have in place."

-Survey Respondent

The objectives rated highest by the public and non-profit sectors were similar (see Table A.4 below): asset management, access issues, historic/cultural resources, transportation system and monitoring impacts. The objectives rated highest by the private sector were more focused on tourism promotion, transportation, research and awareness building among Montana residents.

Table A.4: Top Rated Objectives by Sector

Obj #	Private	Rating	Obj #	Public	Rating	Obj #	Non-profit	Rating
1.5	Preserve lodging tax for tourism	4.48	4.4	Protect natural/historic/cultural assets	4.16	4.5	Access issues on public/private lands	4.38
6.2	Communicate to domestic markets	4.43	1.5	Preserve lodging tax for tourism	4.15	5.3	Retain character and sense of place	4.32
5.1	Improve transportation system	4.28	4.5	Access issues: public/private lands	4.14	4.2	Monitor visitation/impacts at sites	4.25
6.1	Conduct strategic research	4.23	2.3	Heritage/cultural products & services	4.12	4.4	Protect natural/historic/cultural assets	4.22
6.7	Communicate with visitors in MT	4.22	5.3	Retain character and sense of place	4.11	2.3	Heritage/cultural products & services	4.22
1.2	Economic impact awareness	4.11	5.1	Improve transportation system	4.10	5.1	Improve transportation system	4.08

"I am very interested in strengthening cultural tourism in Montana - high quality interpretation, preservation and conservation. These are all activities that relate to educational experiences for Montana youth and quality of life components critical to the new economy and business recruiting."

-Survey Respondent

Analysis of the objective ratings by region revealed some interesting differences. The top six objectives rated by each region are listed in Table A.5 (objective descriptions are listed in Table A.6, next page). Glacier and Yellowstone Country respondents had similar priorities, which focused on issues related to natural/historic/cultural resource protection and management, heritage/cultural tourism and improving transportation. Maintaining the lodging tax for tourism promotion was not in the top six for Glacier or Yellowstone Country respondents (it was number one or two among respondents from other countries).

Russell Country respondents focused more on infrastructure (meeting/convention facilities, transportation, VIC's/rest areas), along with heritage/cultural tourism and retaining community character. Gold West Country respondents focused on infrastructure, along with protection of assets, maintaining community character, and access to lands. Missouri River and Custer Country respondents added promotion items to their top six list: custom packages for specialty markets, consumer promotion, signage and in-state promotion. Infrastructure also was a top priority (transportation, VIC's, rest areas), as was access to public/private lands.

Table A.5: Top Rated Objectives by Region

Glacier		Russell		Missouri River		Gold West		Yellowstone		Custer	
Obj.#	Rating	Obj.#	Rating	Obj.#	Rating	Obj.#	Rating	Obj.#	Rating	Obj.#	Rating
5.3	4.37	5.1	4.33	6.7	4.56	1.5	4.20	4.5	4.36	1.5	4.48
4.5	4.31	1.5	4.29	1.5	4.44	5.1	4.15	4.4	4.32	4.5	4.33
4.4	4.25	2.3	4.20	5.5	4.38	4.5	4.12	4.2	4.17	6.7	4.29
2.3	4.18	2.5	4.12	5.1	4.31	4.4	4.07	5.1	4.14	5.4	4.29
4.2	4.16	5.3	4.10	5.4	4.31	5.3	4.06	5.3	4.14	5.1	4.25
4.3	4.08	5.4	4.10	2.4	4.25	5.4	4.02	1.1	4.07	6.2	4.14

Table A.6: Overall Ratings of Objectives

<u>Rank</u>	<u>Obj. #</u>		<u>Mean Rating</u>
1	1.5:	Maintain the Montana lodging tax for tourism promotion and development.	4.16
1	4.5:	Address access issues on public and private lands.	4.16
1	5.1:	Improve Montana's transportation system for resident/nonresident visitors.	4.16
4	5.3:	Retain community character and "sense of place" - be true to Montana heritage and community values.	4.13
5	2.3:	Expand products and services for heritage and cultural visitors.	4.08
6	4.4:	Support management tools to protect natural/historic/cultural assets while maintaining viable tourism/rec'n industry.	4.07
7	6.7:	Communicate with visitors as they travel through and around Montana.	4.06
8	5.4:	Enhance visitor information centers (VIC's) and rest areas, extend hours/seasons.	4.02
9	4.2:	Improve systems for monitoring visitation and impacts at natural/cultural/historic assets.	4.00
10	5.5:	Address needs for directional, interpretive and promotional signs.	3.95
11	4.3:	Develop a system of planning and policy development for management of natural/historic/cultural assets.	3.94
12	1.3:	Enhance awareness among state and tribal elected officials about tourism's statewide impacts/benefits.	3.90
12	6.2:	Communicate to domestic consumer markets with highly targeted promotions.	3.90
14	1.1:	Regularly measure citizen attitudes, perceptions and acceptance.	3.88
15	6.1:	Conduct strategic research to enable decision-making about tourism/recreation development/promotion.	3.81
16	4.1:	Evaluate current conditions/needs related to management of natural/historic/cultural assets.	3.80
16	4.6:	Encourage visitation to targeted areas via special designations and management programs.	3.80
18	1.4:	Involve Montana citizens in tourism development and promotion.	3.78
18	5.2:	Enhance community/tribal tourism and recreation facilities and services.	3.78
20	2.5:	Enhance facilities and services for meetings, conventions and corporate retreats.	3.76
21	1.2:	Increase awareness among Montana citizens about the economic/social impacts & benefits of tourism.	3.73
22	6.3:	Increase promotion activities that target meeting and convention markets.	3.72
23	1.7:	Seek to develop funding sources for tourism and recreation-related facilities, services and infrastructure.	3.71
24	6.8:	Track, evaluate and distribute results of tourism promotion efforts.	3.69
24	7.5:	Enhance consistency and coordination among state and federal agencies.	3.69
26	6.4:	Participate in cooperative promotion efforts to attract international visitors.	3.68
27	7.3:	Share information and technical resources between tourism and recreation partners.	3.68
28	7.6:	Facilitate private-public-nonprofit-tribal partnerships for tourism promotion and funding.	3.66
29	6.5:	Communicate to strategic group, motorcoach and travel trade markets.	3.65
29	2.4:	Build custom packages and offerings for specialty markets.	3.65
31	2.2:	Encourage development of targeted off-peak season activities and packages.	3.60
32	2.1:	Enhance Montana's winter recreational product and service offerings.	3.58
33	7.1:	Form/foster public-private-nonprofit-tribal partnerships to coordinate effective implementation of actions.	3.57
34	6.6:	Increase promotion efforts targeting media and film production markets.	3.56
35	7.4:	Provide opportunities for awareness-building and professional development/education among sectors.	3.55
36	3.1:	Continue development of agri-tourism to diversify rural economies.	3.52
37	3.5:	Enhance support systems and tools for business development.	3.48
38	7.2:	Coordinate and monitor Tourism & Recreation Strategic Plan implementation.	3.42
39	3.2:	Increase entrepreneurial opportunities on public lands and reservations.	3.41
40	1.6:	Develop additional creative funding sources for tourism activities.	3.40
41	3.3:	Review/refine regulations and licensing to support businesses.	3.36
42	3.4:	Enhance programs for training/technical assistance to businesses.	3.34

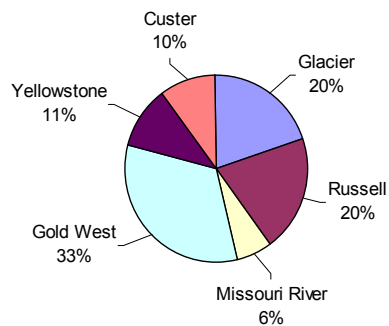


Figure A.1: Regional Distribution of Survey Respondents

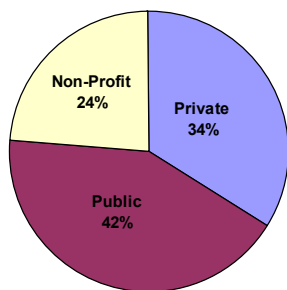


Figure A.2: Sector Distribution of Survey Respondents

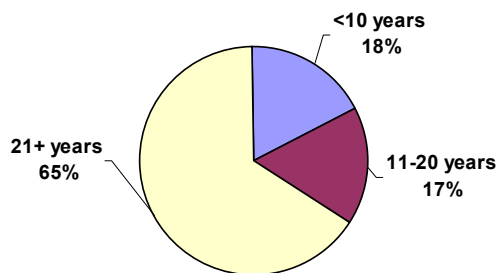


Figure A.3: Residence Longevity of Survey Respondents

Survey Methodology

The online survey was conducted using a survey web site hosted by Web-Surveys.net in Seattle, Washington. The Hingston Roach Group, Inc. developed the survey questionnaire from the draft version of the strategic plan goals, objectives and actions. The questionnaire was pre-tested for usability and utility to minimize measurement error. The final survey was available for completion by participants from Friday, April 6, through Thursday, April 11, 2002. The average length of time to complete the survey was 18.7 minutes; and more than 90% of people who began the survey completed it.

Survey participants were asked to rank the seven goals by entering a number in a space provided next to each goal. They were to assign the goal ranked most important a number 1, the goal ranked second a number 2, and so on until all seven goals were assigned a prioritization number. Each of forty-two objectives was rated on a scale of 1 to 5, where 1 was *Not At All Important* and 5 was *Extremely Important*. Each objective was rated for importance in the context of the goal, not in relation to objectives listed under the other six goals.

At the conclusion of each of the eight survey sections, a comment field was provided for participants to write comments or suggestions to the planning team. More than 650 comments were received(!), with very insightful feedback for the planning team about the goals, objectives, actions and strategic planning process. Interestingly, the survey comments were very consistent with the comments received at the eight Strategic Plan public meetings held around the state in October and November of 2001. The Hingston Roach Group analyzed the comments by topic, as well as by sector and region of the respondent. Selected representative comments are included in the survey report, and all of the comments are available for review on the Department of Commerce Promotion Division (Travel Montana) Intranet site, or from Department staff.

The survey results were analyzed using Statistical Package for the Social Sciences (SPSS) software. Analyses of variance were used to test for significant relationships. Significant findings are reported at the $p \leq .05$ level. All research studies are subject to error and this one is no exception. The planning team intended this to be an informal survey only to provide general direction about priorities. An estimate of sampling error is not possible because a non-probability sample design was employed (not every person in the study population had a non-zero chance of being included in the study). The sample design was not random nor did it incorporate stratification to ensure proportionate representation of population sub-groups. While the planning team attempted to minimize non-response error, not everyone in the sampling frame was available during the study period, and some chose not to complete the survey. Some respondents may have experienced technical or navigational difficulties with the web-based format or experienced Internet connection problems.

Survey Participants

Survey participants were identified by the planning team through various tourism and recreation stakeholder groups in Montana. To develop the list of potential respondents, 90 stakeholder groups were contacted. Those initial contacts were emailed a request to submit up to ten names of members/employees of their affiliate organizations or agencies. Seventy-five groups responded with five or more names (see list of stakeholder groups, page 8). The list of potential survey participants included 422 names.

Potential respondents received a Survey Alert email on Friday, March 29, 2002. The purposes of the alert email were to serve as a pre-invitation to participate in the online survey, to explain the purpose and importance of the survey, and to encourage participation. Those who did not complete the survey by Wednesday, April 10, were sent a reminder email to do so by the end of the next business day. At the conclusion of the data collection period, 248 respondents completed the survey – for a 59% response rate of the potential participants contacted.

Respondents represented all six tourism regions of the state. The heaviest concentration of respondents came from Gold West Country, due to the location of state/federal agency offices in Helena. However, many of these agency respondents have lived in multiple regions of the state, and have statewide responsibility/perspective, as demonstrated by their comments.

The sector representation of respondents was about one-third private sector, 42% public sector (including state, federal, county, city, university and tribal representatives), and about one quarter non-profit sector. The planning team had the most difficulty recruiting participation from the non-profit sector, as many non-profit organizations are volunteer membership based, often with no full-time paid staff. Figure A.5 shows the sector affiliation of respondents from each of the six tourism regions. Glacier, Russell and Yellowstone Countries had more private sector respondents than public or nonprofit sector respondents. Gold West, Missouri River and Custer Countries had more public sector respondents.

Two-thirds of respondents have lived in Montana more than 20 years. (Figure A.3, previous page). Respondents represented a broad spectrum of affiliations, from hotels to agriculture, conservation organizations, transportation carriers and tribes (Figure A.4). About 30% represented public agencies: city or county government, state and federal agencies. About 34% represented various segments of private industry (hotel, restaurant, agriculture, tour operator, marketing agency, outfitters and guides, retail and transportation carriers). About one-quarter (24%) represented non-profit organizations such as conservation/wildlife groups, arts/historical organizations, and sportsmen's groups. The remainder of respondents represented tribes (5%), education (3%) and other stakeholder groups.

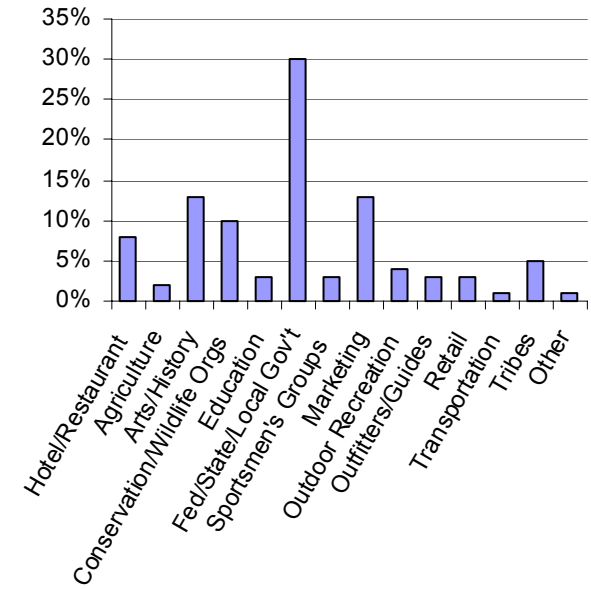


Figure A.4: Affiliation Distribution of Survey Respondents

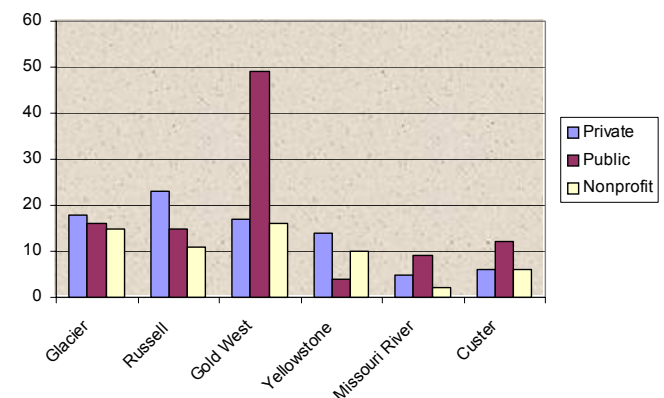


Figure A.5: Sector Distribution by Region of Respondents

Online Survey List of Participant Organizations

Amtrak	Montana League of Cities & Towns
Big Sky Airlines	Montana Lewis & Clark Bicentennial
Blackfeet Tribe	Commission
Bureau of Land Management	Montana Outfitters and Guides Assn. (MOGA)
Bureau of Reclamation	Montana Ranch Vacation Association
Clark Fork Coalition	Montana Recreation & Parks Assn. (MRPA)
Custer Country	Montana Restaurant Association
Ducks Unlimited	Montana Retail Association
Montana Fish, Wildlife & Parks	Montana Rural Development Partners
Fishing Outfitters Assn. of Montana (FOAM)	Montana Shares
Flathead Valley Community College	Montana Ski Areas Association
Ft. Belknap Reservation	Montana Snowmobile Association
Ft. Peck Reservation	Montana State University
Glacier Country	Montana Stock Growers Association
Gold West Country	Montana Tourism Coalition
Great Falls Chamber of Commerce	Montana Tribal Tourism Alliance (MTTA)
Greater Yellowstone Coalition	Montana Wilderness Association
Little Shell Tribe	Montana Wildlife Federation
Made in Montana	Montana Wildlife Society
Missoula Cultural Council	Montana/Wyoming Tribal Leaders Council
Missouri River Country	National Park Service
Montana Agricultural Business Assn. (MABA)	National Parks Conservation Association
Montana Arts Council	The Peoples Center (Flathead Reservation)
Montana Association of Counties (MACo)	Predator Conservation Alliance
Montana Bed & Breakfast Association	Rocky Boys Reservation
Montana Bowhunters Association	Rocky Mountain Elk Foundation (RMEF)
Montana Campground Owners Association	Russell Country
Montana Community Foundation	Salish/Kootenai Tribes
Montana Department of Commerce	Tourism Advisory Council (TAC)
Montana Dept. of Natural Resources & Conservation	Tourism Marketing Agencies (H2O, Wendt-Kochman, Off The Beaten Path)
Montana Department of Revenue	Trout Unlimited
Montana Department of Transportation	University of Montana
Montana Governor's Office	US Army Corps of Engineers
Montana Grain Growers Association	US Fish & Wildlife Service
Montana Heritage Commission	USDA Forest Service
Montana Historical Society	Walleyes Unlimited
Montana Inn Keepers Association (MIKA)	Yellowstone Country

Full Online Survey Report: Significant Findings Related to Individual Goals & Objectives

The strategic elements for the Montana Tourism & Recreation Draft Strategic Plan 2003-2007 included seven major goals and 42 objectives. To gather insights for prioritization of the goals and objectives, participants in the online survey were asked to rank the seven goals and rate each of the 42 objectives on a scale of 1 to 5. Some examples of proposed actions were provided under each objective, and participants were informed that the actions were examples only.

Planning team observations about the survey results are listed in the text boxes below each goal and objective. The goals are listed in numerical order with a notation as to the goal's rank from the online survey results. The numbered objectives below each goal are listed in order of rating scores (highest to lowest) based on mean score. Examples of proposed actions are shown below each objective as they appeared in the online survey.

GOAL 1: Enhance awareness and support for tourism and recreation among Montana citizens and elected officials, including development of additional funding sources.

- Goal 1 ranked fifth of the seven goals.
- The public sector ranked Goal 1 significantly higher than did the private and non-profit sectors.
- Respondents from Missouri River and Custer Countries ranked Goal 1 higher than the other regions.

Obj. 1.5: Maintain the Montana lodging tax for tourism promotion and development.

- Educate Montanans/elected officials about the uses and benefits of lodging tax.
- Seek endorsements from communities and other industries/organizations about the benefits of lodging tax funding for tourism.
- Provide information from national studies about lodging tax uses/benefits.

- Objective 1.5 rated highest among Goal 1 objectives, and was the highest rated objective overall.
- The private and public sectors rated Objective 1.5 significantly higher than did the non-profit sector (Table A.7 at right).
- Respondents from Glacier and Yellowstone Countries rated this objective somewhat lower than other regions. Survey comments indicate that some respondents from these regions have concerns about tourism impacts.

"Lack of awareness of the fact that many Montana citizens are in the tourism industry is a key barrier to further open discussion and appropriate development of resources that can sustain families in our State."

- Survey Respondent

"Without advertising dollars the tourism industry would be very hurt and therefore the entire economy of Montana."

-Survey Respondent

Table A.7: Ratings for Objective 1.5 by Sector

<u>Sector</u>	<u>Mean Rating</u>
Private	4.46
Public	4.13
Non-profit	3.80
Overall	4.16

"Too many [Montanans] see tourism as something out-of-staters do and that the rest of us just stay at home."

-Survey Respondent

Table A.8: Ratings for Objective 1.1 by Region

<u>Region</u>	<u>Mean Rating</u>
Yellowstone	4.07
Russell	3.96
Custer	3.92
Gold West	3.89
Missouri River	3.75
Glacier	3.71
Overall	3.88

"You're planning on taxing/killing the goose that laid the golden egg, looks like to me."

-Survey Respondent

Table A.9: Ratings for Objective 1.2 by Sector

<u>Sector</u>	<u>Mean Rating</u>
Private	4.11
Public	3.61
Non-profit	3.42
Overall	3.73

1.3: Enhance awareness among state and tribal elected officials about tourism's statewide impacts and benefits.

- Involve key officials in participatory educational events.
- Sponsor a tourism day at the legislature.
- Present information about tourism's economic/social impacts and benefits at annual meetings of county and city/town associations

- Objective 1.3 rated second highest among objectives under Goal 1, and 12th among all 42 objectives.
- There were no significant differences in ratings by sector.
- Respondents from Missouri River and Yellowstone Countries rated Objective 1.3 lower than those from other regions.

1.1: Regularly measure citizen attitudes, perceptions and acceptance of tourism and recreation, along with its economic/social impacts and benefits.

- Conduct research to determine Montanans' opinions about tourism and recreation.
- Measure the economic impacts/benefits of tourism and recreation.
- Measure economic impacts of specific attractions and events.

- Objective 1.1 rated third overall among objectives under Goal 1, but the non-profit sector rated it highest of Goal 1 objectives. It was 14th among all 42 objectives.
- Of all the regions, Russell and Yellowstone Country respondents were most concerned with Objective 1.1; while Glacier was least concerned (Table A.8).

1.4: Involve Montana citizens in tourism development and promotion.

- Continue the Invite-A-Friend campaign to promote tourism in Montana.
- Host local/regional events to increase citizen awareness about tourism.
- Encourage citizens to volunteer for beautification/clean-up efforts.

- Objective 1.4 rated 4th under Goal 1, and 18th overall, with no significant differences by sector or region.

1.2: Increase awareness among Montana citizens about the economic/social impacts and benefits of tourism.

- Continue public education about tourism & recreation through the media.
- Distribute information through printed material (fact sheets, etc.)
- Plan and promote National Tourism Week activities statewide.
- Enhance tourism awareness in schools (Teens in Tourism, etc.).

- Objective 1.2 rated fifth of seven objectives under Goal 1, and 21st among all 42 objectives.
- The private sector rated Objective 1.2 higher than either the public or non-profit sectors (see Table A.9).
- Respondents from Missouri River Country rated Objective 1.2 lower than other respondents.

1.7 Seek to develop stable funding sources for tourism and recreation-related facilities, services and infrastructure.

- Evaluate expansion of user fees for public facility recreation (hiking, mountain biking, float boating, cross-country skiing, camping, etc.).
- Encourage local/regional attractions to generate more revenue from visitors (entrance fees, donations, gift shops, education activities, VIP cards, etc.).
- Evaluate viability of targeted sales taxes on tourist-related goods/services (car rental tax, resort tax, auditorium tax, etc.).
- Explore creation of local-option recreation districts to fund community/county recreation facilities and services.

- Objective 1.7 rated sixth among the seven objectives under Goal 1, and 23rd of 42 objectives overall.
- The public & private sectors gave Objective 1.7 a higher rating than the non-profit sector (Table A.10).
- In fact, the non-profit sector rated Objective 1.7 lowest among all 42 objectives, perhaps due to concerns about user or entrance fees or taxes, affecting attendance, participation, etc.
- Custer Country respondents rated Objective 1.7 higher than did respondents from other regions, respondents from Yellowstone Country rated it lower.

1.6: Develop additional creative funding sources for tourism activities.

- Create a "Montana Visitor Passport" program, with a portion of proceeds from passport sales used to support local/regional tourism efforts.
- Develop local/regional visitor packages with a portion of proceeds used for local/regional tourism efforts.
- Consider fees for business listings/ads on state and regional tourism web sites.

- Objective 1.6 rated seventh among seven objectives under Goal 1, and 40th of 42 objectives overall.
- Private and public sector respondents rated Objective 1.6 lowest among all 42 objectives.
- Respondents from Missouri River country rated Objective 1.6 higher than did respondents from Yellowstone and Glacier countries (Table A.11). Perhaps this is due to greater needs for funding, and higher interest in regional cooperation, in Missouri River and Custer countries.

Table A.10: Ratings for Objective 1.7 by Sector

<u>Sector</u>	<u>Mean Rating</u>
Public	3.89
Private	3.76
Non-profit	3.34
Overall	3.71

"No user fees for residents to support tourism!"

-Survey Respondent

"Need to implement a sales tax so tourists pay their own way. Lift that burden off the Montana taxpayer."

-Survey Respondent

Table A.11: Ratings for Objective 1.6 by Region

<u>Region</u>	<u>Mean Rating</u>
Missouri River	4.06
Russell	3.52
Custer	3.50
Gold West	3.35
Glacier	3.31
Yellowstone	3.07
Overall	3.40

"The focus on tourism seems to be limited to how we can increase and stabilize the industry, with little or no attention paid to the adverse affects. From the perspective of a lifelong Montanan, the increase in recreational tourism, particularly "consumptive" uses like fishing and hunting, has had a clear and negative effect on the quality of life that has kept people in Montana for generations, despite an economy that has been so chronically in recession that the current nation-wide recession does not even register here. Loss of access to lands traditionally available for informal public use, crowding on rivers and streams and deference to commercial users have all contributed to negative view of the tourism industry among those who cherish the opportunities to enjoy the natural amenities that come with living in Montana. Before we spend valuable public funds to lure more tourists to Montana, it seems that we should do a much better job of acknowledging, planning for and ameliorating the conflicts and resource degradation that arise because of tourism."

-Survey Respondent

Table A.12: Rankings for Goal 2 by Sector

<u>Sector</u>	<u>Mean Rating</u>
Non-profit	4.95
Public	4.77
Private	4.37
Overall	4.68

"We need to balance our recreation services and take advantage of Montana's rich cultural and historic resources to expand the visitor season and length of stay."

-Survey Respondent

"As a frequent out of state traveler for business, I often find that I would like to come back to that area on a family vacation. So encouraging businesses to hold meetings and conventions could help increase recreational travel as well."

-Survey Respondent

Table A.13: Ratings for Objective 2.5 by Region

<u>Region</u>	<u>Mean Rating</u>
Russell	4.12
Gold West	3.78
Missouri River	3.69
Glacier	3.61
Custer	3.58
Yellowstone	3.50
Overall	3.76

GOAL 2: Expand four-season visitor spending through development and enhancement of tourism/recreation products and services, focusing on visitor segments that spend more money and stay longer, to distribute benefits of tourism to all regions of the state.

- Goal 2 ranked second among the seven goals.
- The non-profit sector ranked Goal 2 as most important of the seven goals.
- The non-profit and public sectors ranked Goal 2 higher than did the private sector (Table A.12).
- Regional ranking placed Goal 2 as most important in Glacier, Russell, Missouri River and Custer Countries; of second importance by Gold West Country; and third by Yellowstone Country.

2.3: Expand products and services for heritage and cultural visitors.

- Develop greater visibility of, and connections between, heritage and cultural assets (museums, galleries, historic/cultural sites, theater, music, events, reenactments, etc.).
- Expand hours/seasons of heritage and cultural attractions (year-round, weekends, etc.).
- Refine/enhance niche and quality of historic/cultural facilities and events to address needs of targeted visitors.
- Provide professionally-researched interpretive programs and facilities for visitors (guided and self-guided tours, taped messages, signage, etc.).
- Package heritage/cultural events and attractions with hotels, dining, outdoor recreation.

- Objective 2.3 rated highest among Goal 2 objectives, and fifth of 42 objectives overall.
- There were no significant differences in ratings among sectors or regions.

2.5: Enhance facilities and services for meetings, conventions and corporate retreats.

- Refine Montana's niche in the meeting/convention market.
- Enhance/develop meeting and convention facilities statewide.
- Expand the "Invite-A-Convention" program to involve citizens and businesses in identifying regional/national groups to recruit for meetings/conventions in Montana.
- Use local historical/cultural attractions for meeting activities to enhance convention venue offerings.

- Objective 2.5 rated second among Goal 2 objectives, and 20th among 42 objectives overall.
- The private sector rated Objective 2.5 significantly higher than did the public and non-profit sectors.
- Respondents from Russell country placed much more emphasis on Objective 2.5 than did respondents from other regions (Table A.13). Surprisingly, respondents from Custer and Yellowstone Countries gave this objective a lower rating than the other regions, perhaps because respondents there felt that current facilities and services are adequate (Table A.13).

2.4: Build custom packages and offerings for specialty markets.

- Continue to develop packages/itineraries for the motorcoach tour market.
- Continue to develop new tourism itineraries for the international market.
- Seek opportunities to host national/international sports competitions.
- Encourage development of “family camps” and packaged family-friendly activities.

- Objective 2.4 rated third among Goal 2 objectives, and 29th among 42 objectives overall.
- The private sector rated Objective 2.4 significantly higher than did the non-profit and public sectors.
- Respondents in Missouri River Country rated Objective 2.4 much higher than those from other regions (Table A.14). Some respondents from Glacier and Yellowstone Countries expressed that their regions have enough tourists, at least during peak season.

Table A.14: Ratings for Objective 2.4 by Region

<u>Region</u>	<u>Mean Rating</u>
Missouri River	4.25
Russell	3.81
Gold West	3.61
Custer	3.58
Glacier	3.49
Yellowstone	3.44
Overall	3.65

2.2: Encourage development of targeted off-peak season activities and packages.

- Create/enhance off-peak season events targeting desirable visitors.
- Create “destinations” with targeted packaging of events/attractions/activities and transportation (theme packages, weekend getaways, event packages, eco-tours, etc.).
- Encourage creation of guided theme tours and adventures in urban/rural areas.

- Objective 2.2 rated fourth of Goal 2 objectives, and 31st of 42 overall.
- The private and public sectors rated Objective 2.2 significantly higher than the non-profit sector.
- Glacier and Yellowstone Country respondents rated Objective 2.2 lower; while Russell and Missouri River Country respondents rated it higher.

"Emphasis should be on appreciation of what we have that's special versus duplicating what is found in other areas of the country."

-Survey Respondent

"Definitely need to spread the benefits of tourism to some of the less traveled parts of the state."

-Survey Respondent

2.1: Enhance Montana's winter recreational product and service offerings.

- Develop enhanced and/or new indoor attractions and facilities (arts/cultural/interpretive facilities, museums, sports venues, event centers, fairgrounds, etc.).
- Refine Montana's niche in the destination ski market and snowmobile markets.
- Package skiing and snowmobiling with other activities (arts/history, events, shopping).
- Expand “alternative” winter activities (ice skating/fishing, snowshoeing, dog sledding, hot springs, arts/cultural/historical events and attractions, state/national park tours, etc.).

- Objective 2.1 rated fifth among Goal 2 objectives, and 32nd overall
- The private sector rated Objective 2.1 significantly higher than public and non-profit sectors.
- Respondents in Russell Country rated Objective 2.1 much higher than all other regional respondents. Glacier and Yellowstone Country respondents rated Objective 2.1 lower.

"As I have indicated before, I think this will be a waste of time and money."

-Survey Respondent

"I am concerned about inviting the expansion of motorized recreation such as snowmobiling. In many areas, we have already reached capacity and to encourage increased motorized usage will take away from opportunities for other types of recreation."

-Survey Respondent

"Four season travel is essential so businesses can keep their doors open all year."

-Survey Respondent

"Winter will always be hard to market the entire state, a lot of Montana has no winter destination places. Mention Montana and Winter to most people and you get COLD UP THERE!! Hard to change that image."

-Survey Respondent

GOAL 3: Nurture business growth and diversification in the tourism and recreation industry through business support services and technical assistance.

"Twenty businesses with five employees are just as important as that one business with one hundred employees. Foster small business development for those that truly live and love Montana."

-Survey Respondent

"Block management needs lots more money to make it attractive to farmers/ranchers."

-Survey Respondent

Table A.15: Ratings for Objective 3.5 by Sector

<u>Sector</u>	<u>Mean Rating</u>
Private	3.65
Public	3.48
Non-profit	3.27
Overall	3.48

Table A.16: Ratings for Objective 3.5 by Region

<u>Region</u>	<u>Mean Rating</u>
Russell	3.71
Custer	3.71
Missouri River	3.44
Gold West	3.43
Yellowstone	3.43
Glacier	3.29
Overall	3.48

- Goal 3 ranked first of seven goals overall.
- Interestingly, the non-profit and public sectors ranked Goal 3 significantly higher than did the private sector.
- Gold West and Yellowstone respondents ranked Goal 3 highest of all the goals, while all other regions ranked Goal 3 as second highest of seven goals.

3.1: Continue development of agri-tourism to diversify rural economies.

- Create/enhance farm, ranch and forestry trade/technical tours.
- Provide accessible education/interpretation about agriculture, forestry and ranching.
- Seek additional revenue opportunities for farmers/ranchers through the block management program (for public access to private lands for hunting).
- Encourage recreational agriculture-related tours (cattle drives, etc.).
- Create systems to encourage tourism businesses to use Montana agricultural products.

- Objective 3.1 rated first of Goal 3 objectives, and 36th of 42 overall.
- The private sector rated Objective 3.1 higher than public and non-profit.
- Custer Country respondents rated Objective 3.1 significantly higher than the other regions.

3.5: Enhance support systems and tools for business development.

- Encourage financial lenders to provide capital, low-interest loan pools, etc.
- Address human resource challenges (labor pool during school year, etc.).
- Enhance "Edu-structure" to support tourism and recreation (school curricula, university tourism extension agents, etc.).
- Inventory all tourism-related resources (technical assistance, funding, etc.) that are available to assist businesses.

- Objective 3.5 rated second among Goal 3 objectives, and 37th among 42 overall.
- The private sector rated Objective 3.5 higher than public and non-profit (Table A.15).
- Respondents in Russell and Custer Countries were most interested in enhancing support systems and tools for businesses development, while respondents in Glacier Country were least interested (Table A.16).

3.2: Increase entrepreneurial opportunities on public lands and reservations to enhance visitor experiences, consistent with land management and tribal objectives.

- Identify opportunities for new or enhanced tourism/recreation businesses (guided adventures; interpretive/eco-tours highlighting wildlife, culture, geology, history; etc.).
- Identify opportunities for enhanced visitor services (equipment rental, food & beverage, firewood, campground concessions, etc.).
- Investigate transfer of maintenance operations at public destinations to the private sector.
- Offer entrepreneurship training on reservations and in communities near public lands.

- Objective 3.2 rated third among Goal 3 objectives, and 39th among 42 overall.
- Not surprisingly, the private sector rated Objective 3.2 highest of the sectors, and the non-profit sector rated Objective 3.2 lowest of Goal 3 objectives
- Missouri River Country respondents rated Objective 3.2 significantly higher than the other regions (Table A.17).

3.3: Review/refine regulations and licensing to support businesses while protecting public safety and Montana's natural/historic/cultural assets.

- Obtain business input about current public/private land regulation issues; review and evaluate refinements.
- Provide guidance to businesses about regulations for promotional and directional highway signage. Encourage use of international sign symbols.

- Objective 3.3 rated fourth of Goal 3 objectives, and 41st of 42 overall.
- The private sector rated Objective 3.3 higher than public and non-profit sectors (Table A.18).
- Respondents in Russell and Custer Countries were most supportive of Objective 3.3, while respondents in Glacier Country were least supportive.

3.4: Enhance programs for training and technical assistance to businesses.

- Provide information about workforce training programs.
- Provide technical assistance regarding business management, marketing, etc.
- Assist businesses with guidelines for effective sign design.
- Evaluate and upgrade the quality of training programs for tourism business.
- Provide entrepreneurial training to new/potential business owners to enhance quality business development on reservations and near attractions.

- Objective 3.4 rated last of Goal 3 objectives, and 42nd of 42 overall.
- The public and private sectors rated Objective 3.4 lowest of Goal 3 objectives.
- Respondents from Yellowstone and Glacier Countries rated Objective 3.4 as least important.

Table A.17: Ratings for Objective 3.2 by Region

<u>Region</u>	<u>Mean Rating</u>
Missouri River	4.19
Custer	3.63
Russell	3.55
Yellowstone	3.54
Gold West	3.26
Glacier	3.10
Overall	3.41

"I DO NOT believe business should have a major say in our resources - they are in it for the money and many forget why we all live here."

-Survey Respondent

Table A.18: Ratings for Objective 3.3 by Sector

<u>Sector</u>	<u>Mean Rating</u>
Private	3.62
Public	3.35
Non-profit	3.02
Overall	3.36

"Training and partnerships with Indian communities is another critical link for the enhancement of tourism in Montana."

-Survey Respondent

"We need more information about GenX so we can plan and manage our emerging workforce successfully. Do not believe in more handouts from the government to off-set reality costs of being in business. Need to provide opportunities for additional learning and training but not at taxpayer expense."

-Survey Respondent

GOAL 4: Develop a more coordinated, proactive system to manage, enhance and protect Montana's natural, historic and cultural assets (lands, sites, parks, attractions) with balanced, sustainable levels of resident and nonresident visitor use.

Table A.19: Rankings for Goal 4 by Sector

<u>Sector</u>	<u>Mean Rating</u>
Private	4.50
Public	2.60
Non-profit	2.30
Overall	3.18

"Must define 'balance' and designate priorities for balance - are resident or visitor needs more important, are revenues more important than ecology, are natural resources more valuable for jobs with good environmental stewardship or are needs of non-residents more important on public lands?"

-Survey Respondent

"Historic and cultural tourism is an important segment of the business."

-Survey Respondent

Table A.20: Ratings for Objective 4.4 by Region

<u>Region</u>	<u>Mean Rating</u>
Yellowstone	4.32
Glacier	4.25
Gold West	4.07
Missouri River	3.94
Russell	3.90
Custer	3.88
Overall	4.07

- Goal 4 ranked seventh of the seven goals overall.
- Surprisingly, the public and non-profit sectors ranked Goal 4 lowest of all seven goals; while the private sector ranked Goal 4 highest of the seven goals (Table A.19).
- Respondents in Glacier, Gold West, Yellowstone, and Custer Countries ranked Goal 4 seventh of the seven goals overall. Missouri River Country respondents ranked it sixth; and Russell Country respondents ranked it fourth.

4.5: Address access issues on public and private lands.

- Facilitate discussion of reasonable access to public lands/waters, and closure of private lands to public use.
- Address motorized vs. non-motorized recreation user conflicts; create new opportunities/areas which separate user groups.
- Resolve management questions related to wilderness/roadless areas through public involvement processes.
- Retain horse and foot trails in wilderness and primitive backcountry areas.

- Objective 4.5 was rated first of all Goal 4 objectives, and 2nd of 42 overall.
- The non-profit sector rated Objective 4.5 higher than public and private sectors.
- Objective 4.5 was highly rated by respondents in all regions.

4.4: Support the use of management tools that protect natural/historic/cultural assets while maintaining a viable tourism and recreation industry.

- Whenever possible, use incentives and partnerships to encourage maintenance and protection of assets.
- Evaluate expansion of licensing for guided recreation activities.
- Develop a system of allocated use (limited numbers of visitor permits) for guided and non-guided trips in areas where visitor numbers are degrading assets.
- Determine types of facilities to be provided for visitors at natural/cultural/historic sites.
- Educate visitors about ethics and responsibilities on public lands.
- Continue to address invasive species problems (noxious weeds, zebra mussels) through collaborative partnerships and educational programs for travelers (brochures, radio, etc.).

- Objective 4.4 rated second among Goal 4 objectives, and 6th among 42 overall.
- The non-profit and public sectors rated Objective 4.4 higher than the private sector.
- Objective 4.4 was rated higher by respondents from Glacier and Yellowstone Countries than the other regions (Table A.20).

4.2: Improve systems for monitoring visitation and impacts at natural/cultural/historic assets.

- Enhance systems to determine the numbers and characteristics of visitors to assets/sites.
- Monitor tourism and recreation impacts to ensure that visitation does not degrade assets.
- Use results of visitation and impact data to inform management decisions.

- Objective 4.2 was rated third of all Goal 4 objectives, and 9th of 42 overall.
- The non-profit and public sectors rated Objective 4.2 higher than the private sector.
- Respondents from Glacier and Yellowstone Countries rated Objective 4.2 higher than other regions.

4.3: Develop a coordinated, proactive system of planning and policy development for management of natural, historic and cultural assets.

- Develop management policies that balance the needs of fish and wildlife with the needs of residents and nonresident visitors, and those of the tourism and recreation industry.
- Support timely development/completion of land management agency planning documents and public input processes.
- Select management options that emphasize balanced resident and nonresident use based on current conditions, carrying capacity, public input, etc.

- Objective 4.3 rated fourth among Goal 4 objectives, and 11th among 42 overall.
- There were no significant differences by sector, and little difference in ratings by region (Table A.21).

4.1: Evaluate current conditions/needs related to management of natural/historic/cultural assets.

- Compile and review agency/tribal information about asset conditions and needs.
- Gather and evaluate public input about past/current/future management of assets.
- Prioritize management/maintenance needs based on agency information and public input.
- Identify common goals and opportunities for inter-agency cooperation and public/private/tribal/nonprofit partnerships to enhance asset maintenance/management.

- Objective 4.1 was rated fifth of all Goal 4 objectives, and 16th of 42 objectives overall.
- The non-profit and public sectors rated Objective 4.1 significantly more important than the private sector (Table A.22).
- The private sector rated Objective 4.1 as least important of Goal 4 objectives.
- There were no significant differences in ratings by region.

"These objectives offer options that are more in line with the fact that Montana's main assets and attractions are its natural and pristine areas. Even so, the words 'proactive system to manage, enhance' are problematic here because they are easily translated into 'develop' rather than 'keep natural'. Therefore, even this goal does not allow people to express a PREFERENCE for keeping Montana's natural areas natural. This survey is too pro-development and should be thrown out."

-Survey Respondent

"This is perhaps our greatest asset, we must understand our impacts on it, and manage these resources wisely."

-Survey Respondent

Table A.21: Ratings for Objective 4.3 by Region

<u>Region</u>	<u>Mean Rating</u>
Glacier	4.08
Yellowstone	3.93
Custer	3.92
Russell	3.90
Gold West	3.90
Missouri River	3.86
Overall	3.94

Table A.22: Ratings for Objective 4.1 by Sector

<u>Sector</u>	<u>Mean Rating</u>
Non-profit	4.08
Public	3.98
Private	3.36
Overall	3.80

"Work towards 'working together' cooperating, etc., rather than 'have it my way or not at all' attitude."

-Survey Respondent

"I am very enthusiastic about the idea of developing cultural tourism corridors. That way, people come to tourism on their own terms - and it may ease the problems/perceptions of public access to private lands. Also, as a private landholder, I don't think the issue is so much with the access as it is with economic impacts, management issues and privacy issues."

-Survey Respondent

Table A.23: Rankings for Goal 5 by Sector

<u>Sector</u>	<u>Mean Rating</u>
Private	3.90
Non-profit	3.30
Public	3.10
Overall	3.40

"Tourism infrastructure development is essential."

-Survey Respondent

4.6: Encourage visitation to targeted areas via special designations and management programs.

- Support implementation of a scenic/historic/tribal byways program.
- Provide information on the benefits of historic districts in cities/towns.
- Evaluate candidates and opportunities to develop designated heritage corridors.

- Objective 4.6 rated sixth among Goal 4 objectives, and 16th among 42 overall.
- The non-profit and public sectors rated Objective 4.6 lowest of Goal 4 objectives.
- Custer Country respondents were most supportive of Objective 4.6, while those from Russell and Yellowstone Countries were least supportive.

GOAL 5: Enhance and maintain tourism and recreation infrastructure to support high quality resident and nonresident visitor experiences.

- Goal 5 ranked sixth of seven goals overall.
- The non-profit and public sectors ranked Goal 5 significantly lower than the private sector (Table A.23).
- Missouri River Country respondents ranked Goal 5 lowest, while Glacier respondents ranked Goal 5 highest of all the regions.

5.1: Improve Montana's transportation system for resident/nonresident visitors.

- Continue to improve roads per Statewide Transportation Improvement Program (STIP).
- Work with air carriers/airports to identify needs and enhance commercial air service.
- Work with car rental agencies to identify needs and enhance year-round services.
- Support passenger rail carriers through state/federal agencies and elected officials.
- Package Montana accommodations/attractions/events/tours with transportation carriers.
- Identify opportunities for transit/shuttle transportation in major destination areas.
- Enhance resident/visitor experiences with bike/pedestrian facilities.
- Continue to address maintenance backlog on roads/bridges/trails.

- Objective 5.1 rated first of Goal 5 objectives, and third of 42 overall.
- The private sector rated Objective 5.1 higher than the public or non-profit sectors.
- All regions rated transportation improvements as very important.

5.3: Retain community character and “sense of place” – be true to Montana heritage and community values.

- Encourage community participation in the National Main Street program for downtown revitalization, and development of a Montana state Main Street program.
- Evaluate community historic/cultural facilities and sites; seek partnership opportunities for maintenance/operation/project funding.
- Provide information about SmartGrowth and other development tools to assist communities in making locally-appropriate development decisions.
- Encourage communities to consider use of the Uniform Code for Building Conservation (UCBC) to assist owners of historic buildings, and the Uniform Code for the Abatement of Dangerous Buildings (UCADB).

- Objective 5.3 rated second among Goal 5 objectives, and fourth among 42 overall.
- The non-profit sector rated Objective 5.3 higher than the public and private sectors.
- Objective 5.3 was rated as important by respondents in all regions (Table A.24).

5.4: Enhance visitor information centers (VIC’s) and rest areas; extend hours/seasons to better serve visitors.

- Continue to implement Montana Dept. of Transportation statewide rest area strategy.
- Evaluate opportunities to provide visitor information at state rest areas.
- Encourage extended hours/seasons at VIC’s through partnerships.
- Standardize methods of recording visitation at VIC’s.
- Develop a VIC staff training program for state-supported VIC’s.

- Objective 5.4 was rated third of Goal 5 objectives, and 8th of 42 overall.
- There were no significant differences between sectors.
- Missouri River Country respondents indicated a much higher interest than other regions in Objective 5.4; while Yellowstone rated these improvements as less important (Table A.25).

"Decrease the size and number of billboards. Billboards obstruct views of Big Sky Country."
-Survey Respondent

"Not crazy about building code demands for historic buildings. Need many additional rest stops, but should be linked to communities where visitors can have an enhanced experience and where maintenance is not a huge problem."
-Survey Respondent

"Cost-share on access roads leading to recreation attractions."
-Survey Respondent

"Infrastructure is of the utmost importance. It isn't right to call the masses when there are no facilities (parking, restrooms, information). Emphasis should be placed here as one of the MOST important issues."
-Survey Respondent

Table A.24: Ratings for Objective 5.3 by Region

<u>Region</u>	<u>Mean Rating</u>
Glacier	4.37
Yellowstone	4.14
Russell	4.10
Custer	4.08
Gold West	4.06
Missouri River	3.88
Overall	4.13

"Montana should have a statewide Main Street program and director - local Main Streets and local economies need this program - it works!"
-Survey Respondent

Table A.25: Ratings for Objective 5.4 by Region

<u>Region</u>	<u>Mean Rating</u>
Missouri River	4.31
Custer	4.29
Russell	4.10
Gold West	4.02
Glacier	3.94
Yellowstone	3.57
Overall	4.02

Table A.26: Ratings for Objective 5.5 by Region

<u>Region</u>	<u>Mean Rating</u>
Missouri River	4.38
Russell	4.00
Custer	4.00
Glacier	3.94
Gold West	3.91
Yellowstone	3.68
Overall	3.95

Table A.27: Ratings for Objective 5.2 by Sector

<u>Sector</u>	<u>Mean Rating</u>
Non-profit	3.86
Public	3.84
Private	3.64
Overall	3.78

"Signage has been a problem for tourism sites for over thirty years. Some cooperation needs to come from the DOT to help give direction to the tourists seeking cultural opportunities."

-Survey Respondent

"We are undergoing the CTAP process currently and it is very worthwhile. We have attempted the Main Street program and I am not impressed. It is difficult to administer in small rural communities - there are easier methods. Signage does need to be more accessible to business."

-Survey Respondent

"We need to get much more proactive in the interpretation for natural attractions."

-Survey Respondent

"I think all tourism is very important however I do not want to see it funded on the backs of Montanans only."

-Survey Respondent

5.5: Address needs for directional, interpretive and promotional signs.

- Work with Montana Dept. of Transportation to develop highway sign guidelines.
- Identify business promotion opportunities with allowable signs (Adopt-A-Highway, etc.).
- Continue to implement the statewide Lewis & Clark interpretive sign strategy.
- Address appropriate use/placement of billboards while maintaining the visual qualities of Montana's landscape.
- Encourage statewide adoption of visitor-friendly international sign symbols.

- Objective 5.5 rated fourth among Goal 5 objectives, and 10th among 42 overall.
- There were no significant differences between sectors.
- Objective 5.5 was rated highest by Missouri River Country respondents, and lowest by Yellowstone (Table A.26).

5.2: Enhance community/tribal tourism and recreation facilities and services.

- Continue to assist communities in assessing their tourism and recreation potential through the Community Tourism Assessment Program (CTAP).
- Encourage evaluation of community and tribal recreation and park facility needs in the context of tourism development, where desired.
- Encourage review of city/county/tribal infrastructure and public services in the context of tourism-related needs (water/sewer, waste, EMS/medical, law enforcement, etc.).

- Objective 5.2 was rated fifth of Goal 5 objectives, and 18th of 42 overall.
- Objective 5.2 was rated least important of Goal 5 objectives by all three sectors (Table A.27).
- There were no significant differences by region.

GOAL 6: Communicate with the market: continue to implement highly targeted and effective promotions to increase awareness and visitation; measure, track and evaluate tourism and recreation industry results and trends.

- Goal 6 ranked fourth of seven goals overall.
- The public and non-profit sectors ranked Goal 6 significantly higher than the private sector.
- Glacier, Gold West and Custer Country respondents ranked Goal 6 higher than Russell, Missouri River and Yellowstone Country respondents.

"Yes, yes and yes! If you don't tell people what you have, the opportunities for them to find you are few and far between. Having the research to substantiate programs is of immeasurable benefit."

-Survey Respondent

6.7: Communicate with visitors as they travel through and around Montana.

- Provide visitor information at rest areas.
- Use visitor information centers for cross-promotion of all regions in Montana.
- Encourage cross-promotion between businesses, attractions, events, etc.
- Enhance information about promotions/packages at visitor centers, so VIC staff can encourage visitors to take advantage of them.
- Enhance Superhost! customer service training program to extend visitor stays.

- Objective 6.7 rated first of Goal 6 objectives, and 7th of 42 overall.
- The private sector rated Objective 6.7 significantly higher than the public and non-profit sectors.
- Objective 6.7 was rated highest by respondents from Missouri River and Custer Countries (Table A.28).

Table A.28: Ratings for Objective 6.7 by Region

<u>Region</u>	<u>Mean Rating</u>
Missouri River	4.19
Custer	4.14
Russell	3.92
Gold West	3.90
Yellowstone	3.82
Glacier	3.74
Overall	3.90

6.2: Communicate to domestic consumer markets with highly targeted promotions.

- Generate interest among top priority consumer segments with media image advertising; tailor messages for heritage/cultural travelers, couples, families, etc.
- Promote weekend getaway packages and off-peak season events to "nearby" markets (Boise, Denver, Salt Lake, Seattle, Spokane, Minneapolis).
- Facilitate visitor travel planning with tourism web sites (www.visitmt.com, www.montanakids.com, etc.) and printed materials.
- Seek opportunities for continued and new multi-state promotion efforts.
- Encourage Montanans to be their own best customers (explore Montana)
- Involve residents in tourism promotion with "Invite-A-Friend" campaign.

- Objective 6.2 rated second among Goal 6 objectives, and 12th among 42 overall.
- The private sector rated Objective 6.2 significantly higher than the public and non-profit sectors (Table A.29).
- Objective 6.2 was rated higher by Missouri River and Custer Country respondents than by respondents from the other regions.

"Collaborative efforts among many providers, working with the promoters (CVB's, etc.) could enhance everyone's understanding of what and how to best promote an area."

-Survey Respondent

Table A.29: Ratings for Objective 6.2 by Sector

<u>Sector</u>	<u>Mean Rating</u>
Private	4.43
Non-profit	3.67
Public	3.59
Overall	3.90

"It is important to keep track of our efforts. It is also important to coordinate our efforts with businesses in the state."

-Survey Respondent

Table A.30: Ratings for Objective 6.1 by Sector

<u>Sector</u>	<u>Mean Rating</u>
Private	4.19
Public	3.70
Nonprofit	3.52
Overall	3.81

Table A.31: Ratings for Objective 6.3 by Region

<u>Region</u>	<u>Mean Rating</u>
Russell	4.10
Custer	3.74
Missouri River	3.68
Gold West	3.68
Yellowstone	3.59
Glacier	3.49
Overall	3.72

"We cannot attract large conventions if there is no place to put the convention. Lack of convention facilities in major cities, like Missoula, is a big issue."

-Survey Respondent

"It's not a 'perception of the difficulty/cost of travel to Montana' - it's a reality."

-Survey Respondent

6.1: Conduct strategic research to enable better decision-making about tourism/recreation development and promotion.

- Conduct research about nonresident and resident visitors in Montana; analyze by region, season, activity and visitor type.
- Conduct annual conversion research to measure results of promotion efforts, and to determine travel planning/decision-making habits of resident and nonresident visitors.
- Determine implications of research findings for state and regional tourism management and marketing efforts (different strategies/emphases for different visitor segments).
- Share results and implications of research with tourism and recreation stakeholders.

- Objective 6.1 rated third of Goal 6 objectives, and 15th of 42 overall.
- The private sector rated Objective 6.1 significantly higher than public and non-profit sectors (Table A.30).
- Missouri River Country respondents rated Objective 6.1 significantly higher than the other regions.

6.3: Increase promotion activities that target meeting and convention markets.

- Define and promote Montana's niche and "brand" in the meeting/convention market.
- Address meeting planner perceptions about the difficulty/cost of travel to Montana.
- Coordinate a strong presence to promote Montana at meeting/convention trade events, including state, regions, CVB's, private sector partners and transportation carriers.
- Use strategic communication to attract targeted meeting/convention segments.
- Host familiarization tours for meeting planners.

- Objective 6.3 rated fourth among Goal 6 objectives, and 22nd among 42 overall.
- The private sector rated Objective 6.3 significantly higher than public and non-profit sectors.
- Respondents in Russell Country rated Objective 6.3 significantly higher than other regions (Table A.31).

6.8: Track, evaluate and distribute results of tourism promotion efforts.

- Work with Montana Department of Revenue to upgrade systems so that lodging sales and tax revenue summary reports are provided monthly by lodging type, property size, etc.
- Coordinate with private/public/nonprofit tourism and recreation partners to conduct enhanced tracking and monthly/quarterly reporting of tourism trends; share information.
- Create consistent format for gathering visitor data, so that information collected by tourism/recreation partners is accurate and usable for statewide/regional analyses.

- Objective 6.8 rated fifth of Goal 6 objectives, and 24th of 42 overall.
- The private sector rated Objective 6.8 significantly higher than the public and non-profit sectors.
- There were no significant differences between regions.

6.4: Participate in cooperative promotion efforts to attract international visitors.

- Communicate with international tour operators and trade representatives about Montana promotions/packages for international visitors.
- Participate in cooperative promotions and trade events with surrounding states (Rocky Mountain International, etc.).
- Coordinate a strong “presence” of Montana tourism suppliers at international trade and consumer events.
- Host familiarization tours for international tour operators and media.

- Objective 6.4 rated sixth among Goal 6 objectives, and 26th among 42 overall.
- The private sector rated Objective 6.4 significantly higher than public and non-profit sectors.
- Respondents from Russell Country rated Objective 6.4 much higher than those in other regions (Table A.32).

6.5: Communicate to strategic group, motorcoach and travel trade markets.

- Promote statewide and regional specialty/niche itineraries and packages.
- Market local/regional travel packages through booking/travel agents and tour operators.
- Coordinate a strong “presence” of Montana destination/facility promoters at group and motorcoach trade events.
- Host familiarization tours for tour operators and tour trade media.
- Provide information for travel trade representatives on the state tourism web site.

- Objective 6.5 rated seventh of Goal 6 objectives, and 29th of 42 overall.
- The private sector rated Objective 6.5 significantly higher than public and non-profit sectors (Table A.33).
- Russell Country respondents rated Objective 6.5 highest, while Glacier and Gold West Country respondents rated this objective as least important of all regions.

6.6: Increase promotion efforts targeting media and film production markets.

- Host media familiarization tours and provide media kits to targeted journalists/producers.
- Increase efforts to recruit media exposure from targeted travel, specialty and trade media (romantic travel, outdoor, history/culture, gourmet, etc.).
- Produce and distribute the Montana film location guide and directory of services.
- Host site visits for film production companies and location scouts.
- Consider options for incentives that could be offered by the State for film production.

- Objective 6.6 rated eighth among Goal 6 objectives, and 34th among 42 overall.
- The private sector rated Objective 6.6 significantly higher than public and non-profit sectors.
- Missouri River Country respondents rated Objective 6.6 significantly higher than other regions; while Glacier Country Respondents rated Objective 6.6 significantly lower than other regions.

Table A.32: Ratings for Objective 6.4 by Region

<u>Region</u>	<u>Mean Rating</u>
Russell	4.06
Custer	3.87
Missouri River	3.75
Gold West	3.64
Yellowstone	3.46
Glacier	3.35
Overall	3.68

Table A.33: Ratings for Objective 6.5 by Sector

<u>Sector</u>	<u>Mean Rating</u>
Private	4.09
Non-profit	3.48
Public	3.41
Overall	3.65

"These all build awareness and will create demand. This should be the primary focus of our tourism strategy. Create demand and free enterprise will largely develop the products for a strong economy."

-Survey Respondent

"Attracting more visitors is a good idea as it increases jobs and tax income. It can also help improve the state's resources if the money made from tourism is used wisely. I'd like to see a large portion set aside specifically for resource protection and improvement."

-Survey Respondent

"The important aspect of this is to have mutual respect, and learn from each other what assets each partner has to contribute. It needs to be a real team - before this can be done we need to educate each other as to what role each organization has to play."

-Survey Respondent

Table A.34: Ratings for Objective 7.5 by Sector

<u>Sector</u>	<u>Mean Rating</u>
Private	3.87
Public	3.63
Non-profit	3.53
Overall	3.69

"Sharing information is the most important thing. Data is no good if no one sees it!"

-Survey Respondent

Table A.35: Ratings for Objective 7.3 by Region

<u>Region</u>	<u>Mean Rating</u>
Missouri River	3.88
Custer	3.79
Yellowstone	3.78
Russell	3.71
Gold West	3.56
Glacier	3.37
Overall	3.68

Goal 7: Build an effective tourism and recreation "team" to facilitate partnerships, share information and leverage funding/technical resources in order to achieve strategic goals.

- Goal 7 ranked third of the seven goals overall.
- The private sector ranked Goal 7 higher than did the public and non-profit sectors.
- Of all the regions, respondents from Missouri River Country ranked Goal 7 the highest.

7.5: Enhance consistency and coordination among state and federal agencies.

- Gather input on conflicting/inconsistent programs and policies.
- Facilitate discussion/coordination of programs/policies to avoid conflicts and simplify regulations and permitting processes.
- Engage active participation of agencies in developing, maintaining and promoting a wide range of outdoor recreation opportunities.
- Identify priorities and opportunities for partnerships to develop and maintain state/federal facilities and programs, and to fund projects.

- Objective 7.5 rated first of Goal 7 objectives, and 24th of 42 overall.
- The private sector rated Objective 7.5 higher than public and non-profit sectors (Table A.34).
- There were no significant differences by region.

7.3: Share information and technical resources between tourism and recreation partners in order to raise the collective level of tourism and recreation expertise among stakeholders.

- Identify sources of information that are valuable to tourism/recreation stakeholders (research, visitor data, trends, seminar content from national/international meetings, etc.).
- Provide mechanisms for sharing information through state and regional entities who can serve as "clearinghouses", compiling information and disseminating it to stakeholders.
- Create a database of tourism/recreation-related technical and funding resources which can be accessed online by stakeholders who seek assistance.
- Enhance sharing of tourism photo libraries between the state, regions, CVB's, tribes and other tourism/recreation partners for promotion and advertising purposes.

- Objective 7.3 rated second of Goal 7 objectives, and 27th of 42 overall.
- The private sector rated Objective 7.3 significantly higher than the other sectors.
- Of all regions, the Glacier Country respondents rated Objective 7.3 significantly lower than other regions (Table A.35).

7.6: Facilitate private-public-nonprofit-tribal partnerships for tourism promotion and funding.

- Identify opportunities to pool marketing dollars among public and private partners in order to fund more effective promotion campaigns (advertising, direct mail, etc.).
- Seek opportunities for cross-promotion between the tourism/recreation industry and Montana-based corporations and/or products.
- Provide timely information about state promotion/advertising plans to regions, CVB's, organizations and businesses so they can plan to co-op/partner in promotions.
- Facilitate partnership development between businesses, attractions, events and asset management efforts to foster mutually-beneficial programs (corporate sponsorships, etc.).
- Create collaborative efforts to promote targeted destinations and events (L&C Bicentennial, heritage corridors, Trail of the Great Bear, etc.).

- Objective 7.6 rated third among Goal 7 objectives, and 28th among 42 overall.
- The non-profit sector rated Objective 7.6 significantly lower than the private and public sectors.
- Respondents in Custer Country rated facilitation of partnerships significantly higher than the other regional respondents (Table A.36).

7.1: Form and foster public-private-nonprofit-tribal partnerships to coordinate effective implementation of priority actions.

- Form an advisory team of private, public, tribal and nonprofit representatives to create partnerships and information-sharing.
- Encourage strategic partnerships for cooperative project funding.
- Seek cooperative opportunities to coordinate statewide and regional planning, packaging, tours and programs between businesses, attractions, events and nonprofit organizations.

- Objective 7.1 rated fourth of Goal 7 objectives, and 33rd of 42 overall.
- There were no significant differences by sector.
- Objective 7.1 was rated highest by Custer and lowest by Gold West Country respondents (Table A.37).

"We don't need more programs, teams, committees, etc. Let government maintain the infrastructure, and let business do the studies, surveys, etc."
-Survey Respondent

"Partnerships and education efforts should include better communications and collaboration between conservation agencies/organizations and tourism industry. Collaborative efforts should go beyond promotion to include stewardship practices and conservation advocacy."
-Survey Respondent

Table A.36: Ratings for Objective 7.6 by Region

<u>Region</u>	<u>Mean Rating</u>
Custer	4.00
Russell	3.85
Glacier	3.60
Gold West	3.54
Yellowstone	3.54
Missouri River	3.50
Overall	3.66

Table A.37: Ratings for Objective 7.1 by Region

<u>Region</u>	<u>Mean Rating</u>
Custer	4.00
Missouri River	3.69
Glacier	3.58
Yellowstone	3.54
Russell	3.50
Gold West	3.47
Overall	3.57

"Montanans are the most important factor in this whole scheme - raise tourism to its rightful place in terms of economic development, FUND and work together in partnership to meet goals."
-Survey Respondent

"Having been involved to some extent with some of the partnerships, I know this is a big project and easier said than done."
-Survey Respondent

"From reading this section, I came away with the strong feeling that Travel Montana needs to develop a stronger education bent. I would say that there is a strong need for some adult learning expertise at the table."

-Survey Respondent

"Encouraging public/private partnerships, heritage corridors, and theme marketing efforts are important goals."

-Survey Respondent

Table A.38: Ratings for Objective 7.2 by Sector

<u>Sector</u>	<u>Mean Rating</u>
Private	3.70
Public	3.38
Non-profit	3.12
Overall	3.42

"A more cooperative effort with state, county and local government with the private sector seems badly needed."

-Survey Respondent

7.4: Provide opportunities for awareness-building and professional development/education among public, private, tribal and nonprofit sectors of the tourism and recreation industry.

- Offer brief educational sessions/presentations in conjunction with tourism and recreation meetings and events (Tourism Advisory Council, regional "country" meetings, Governor's Conference, Montana Recreation & Parks Assn., Montana Tourism & Recreation Initiative, etc.).
- Provide opportunities for state, federal, tribal and regional staff/volunteers responsible for tourism promotion to participate in regional familiarization tours in Montana.
- Educate businesses/attractions about the needs and preferences of targeted visitors (international – Canada/Europe, heritage/cultural, families, seniors, business travelers, etc.).
- Sponsor workshops about the methods and uses of tourism and recreation research, including insights about national/international trends and implications for Montana.

- Objective 7.4 rated fifth among Goal 7 objectives, and 35th among 42 overall.
- There were no significant differences by sector or region.

7.2: Coordinate and monitor Tourism & Recreation Strategic Plan implementation.

- Retain a staff position at Dept. of Commerce to help coordinate and monitor implementation of strategic plan objectives and actions.
- Develop a user-friendly system of annual reporting on status of strategic plan actions and implementation needs, to be used by public, private, nonprofit and tribal partners.
- Coordinate implementation of Tourism & Recreation Strategic Plan with implementation of Montana Economic Development Strategy.

- Objective 7.2 rated sixth among Goal 7 objectives, and 38th among 42 overall.
- Objective 7.2 was rated the lowest of Goal 7 objectives by the public and non-profit sectors (Table A.38).
- There were no significant differences by region.

"By working together, all of us can accomplish much more. This is a critical piece to the whole puzzle of economic development in Montana. Each piece of that puzzle has to be willing to give a little in exchange for some of the take."

-Survey Respondent

"Partnerships are critical but make sure the discussions of this teamwork look at ALL issues/concerns and NOT JUST how do we promote Montana. Need to make sure we are protecting Montana so it remains what people love about us."

-Survey Respondent

NOTE: A list of all survey respondent comments, listed by goal number, sector and region, are available for review on the Department of Commerce Promotion Division (Travel Montana) Intranet site, or from Promotion Division staff.